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ABSTRACT

A productive Catholic school alumni relations program seeks to involve each and every alumnus as an active supporter, strengthening and advancing both the school and Catholic education generally. This handbook introduces its topic by describing alumni program objectives and factors essential to program success. The booklet then discusses program organization, covering the alumni association's structure and activities, the establishment of special groups, and the school's alumni relations staff. The handbook next reviews methods for communicating with alumni, including publishing newsletters and reports and hosting meetings and special events. the booklet then considers benefits the school can offer the alumni--as a resource and as a focus for continuing education and cultural enrichment--and balance them against benefits the alumni can offer the school: aiding student recruitment, helping students directly, advising the school's administration, and working in the development program. The handbook outlines aspects of fund raising programs next, and suggests several special activities and events for alumni. The booklet closes by stressing the value of good alumni records and research. Appendixes offer additional tips for using and serving alumni, samples of alumni association by-laws and survey forms, and a job description for an alumni program director. (PGD)

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The Alumni Program

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The Alumni Program

by Charles P. Cushman

National Catholic Educational Association
Office of Development

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About the Author

Charles P. Cushman is a partner in the firm of Gonser Gerber Tinker Stuhr, development consultants, Chicago. This firm was founded in 1950, and has served over 400 colleges, universities, seminaries, independent schools, hospitals and other charitable agencies as consultants in all phases of their development programs.

Mr. Cushman has been active in development work for 24 years. He served Pacific University, Forest Grove, Oregon as Alumni Director and Assistant in Development for six years, and was Vice President for Development at Iowa Wesleyan College, Mt. Pleasant, Iowa, for six years. In 1973 he became the first Director of Development at John Muir Memorial Hospital, Walnut Creek, California. He joined the firm of Gonser Gerber Tinker Stuhr in 1975 and was elected partner in 1979.

His articles have appeared in *College and University Business, The Foundation Grants Index, NAHD News, NAHD Journal* and the newsletter of the American Society for Hospital Publications. He has co-edited one book, *On Development*, published in 1977 by Gonser Gerber Tinker Stuhr.

Mr. Cushman has been active in various regional and national professional associations, including the Council for the Advancement and Support of Education, the National Associations for Hospital Development and the National Society of Fund-Raising Executives. He resides in Naperville, Illinois, a suburb of Chicago, with his wife and two sons.

Foreword—
The Alumni Program

Alumni of America's Elementary and Secondary Catholic schools are a tremendous national asset. They are a gem that the American church has only begun to appreciate. Reflection will lead to the establishment of alumni programs in which graduates will continue to be an active part of the mission of local Catholic education.

Several editorial decisions had to be made in the production of this book. The term "Alumni" is used in the generic sense to refer to both female and male persons. No sexism is intended by not using the term "Alumni/ae" throughout. Mr. Cushman presents many ideas and practical suggestions which at first reading may seem to be less than applicable to smaller and/or elementary schools. He is writing about the *ideal* and thereby invites the adaptation of his ideas to all schools.

The Office of Development/NCEA enjoys success with its educational program for members in large part because of the continuing efforts of Gonser Gerber Tinker Stuhr. Mr. Cushman's text is the latest in the continuing relationship. We all benefit from his dedication and thank him for his assistance.

Rev. Robert J. Yeager
Vice President/Development
February 28, 1986

The Alumni Program

Charles P. Cushman

Alumni as Facet of Development Program

An effective program to involve alumni in the mission of a Catholic school is one of the most important facets of a comprehensive development program.

Alumni can help you identify and reassess your institutional mission and aims, evaluate your academic program in light of these aims, project your programs into the future, determine what you must have to reach your goals, and work toward building the human and financial resources necessary to reach these goals.

All of your alumni should be ambassadors for your school and for its work of educating students. A productive alumni relations program seeks no less—its goal must be to involve each and every alumnus in an active way to strengthen and advance your school. The diplomas which your alumni hold are only as valuable as the quality of the education which your school offers at any given time, so alumni have a continuing self-interest in the strength and vitality of your school today as well as in the future.

In fact, the alumni relations program should have an even broader aim—to mobilize behind *all* of Catholic education (as well as your specific school) the full strength of alumni understanding and support in all its moral and practical manifestations.

A comprehensive alumni relations program has numerous objectives. They include:

- To create an informed and interested body of alumni fully aware of its responsibilities to the school.

- To encourage the alumni to maintain a continuing relationship with the school.
- To enlist the services of alumni in constructive endeavors for the school.
- To stimulate alumni to participate in civic affairs.
- To provide intellectual stimulation and encouragement for continuing education for the alumni, instilling in them the recogniti on that education is a life-long process.
- To encourage support for the school's fund raising and student recruitment goals, recognizing their significance in the school's service to society.
- To develop specific programs of activity and participation in relation to the above.

Alumni interest in the school must be stimulated and supported. It will not be productive if left only to its own momentum. Those private schools which have strong alumni programs and strong alumni support have made them a priority and have invested heavily in them.

Among the essentials to a successful alumni relations program are:

- Acceptance by the school of alumni as *partners* in the educational enterprise and not merely as "another public".
- A plan of organization to facilitate alumni involvement and participation in all aspects of the program.
- An adequate system of records including the means for identifying alumni leadership.
- Effective channels of communication through the printed word and direct contacts.
- A student cultivation program leading to acceptance of responsibilities as alumni.
- Programs carefully designed to utilize alumni potential for service—fund-raising, student recruitment, public relations, school long-range planning, etc.
- Programs designed to serve the alumni, programs ranging from continuing education to social activities.
- A firm financial base for alumni operations, regardless of the source of support.

- A competent and dedicated staff.
- Effective liaison and coordination with the total school program.

Organization for a Successful Alumni Program

The concept of an ongoing, comprehensive development program is predicated, among other things, on the involvement of volunteers. (See *Understanding and Implementing Development*, another in this series of booklets published by the National Catholic Educational Association.) As volunteer participation is crucial to the development program in general, so, too, is it essential in the alumni program.

Education is so highly regarded by most persons that the average school has millions of dollars worth of volunteer talent at its disposal.

This volunteer talent is especially important for two reasons. In the first place, few Catholic schools these days can afford to hire all the staff needed to carry on all the vital activities of recruiting good students, organizing and implementing various special events and functions, spreading the word of the school's good record of service, and raising needed funds for operations, capital growth and long term financial stability. Even more important, the right volunteer, carefully selected and properly trained and serviced, is often more effective at specific tasks or with specific prospects than the paid staff.

The Alumni Association

The mobilization of alumni volunteers for the many facets of a productive alumni program is best achieved through an organized Alumni Association. This attracts and helps develop alumni leadership as well as to provide structure for the involvement of alumni in establishing realistic goals and implementing the various programs.

The Alumni Association should be governed by an elected Board of Directors of 15-20 members who are willing to meet 6-8 times per year to plan and carry out the various activities of the Alumni Association. Resist the temptation to settle for a hard working group of say, "eight committed alumni". The

demands on a small group will be so great that they will quickly be overwhelmed, "burned-out" and unproductive. A Board of 15-20 means that each member doesn't need to serve on more than one or two committees of particular personal interest without risk of becoming overworked. This size also ensures elasticity to accommodate those well-meaning volunteers who can't make every meeting or take as active a role as they had wanted.

An active Board needs to meet often enough to move the program forward. Where the Board members live somewhat dictates the frequency of their meetings. But those Boards which meet only once or twice a year never seem to develop the needed momentum. Six to eight times seems about right. Conversely too many meetings can lead to wasted time. Monthly meetings are too frequent, particularly if the Board has an effective committee system. Set the dates of the Board meetings well in advance and don't waver from them unless absolutely necessary.

The most dedicated, competent leadership available should serve on the Board. The alumni body as a group should elect the members of the Board and the officers of the Association. A key role of the Alumni Director in this regard is to constantly be on the alert for potential Board members and to work closely with the Nominating Committee of the Board in identifying and recruiting them. It's a good idea, too, to work to achieve a broad representation of classes or decades on the Board. Since alumni tend to know primarily those with whom they were in school, staff needs to guard against the evolution of a Board comprised primarily of alumni from one class.

As to terms of service, a term of three years, with allowance for reelection one time, is about right. This provides continuity but also insures the infusion of new ideas through new Board members. A Board which has no turnover becomes stale and in-bred, and can often become involved in day-to-day office operations, which is extremely detrimental to the program. Officers of the Association (typically, a President, Vice President, Secretary Treasurer and Committee Chairpersons) should serve one or two years in their positions, preferably preceded by at least one year as a member of the Board "at-large".

The real work of the Alumni Association is carried out by a strong committee system. Standing and Special Committees are established to plan and carry out the various programs for

alumni. Typical among an Alumni Association's Standing Committee would be:

- *Fund Raising Committee*—to organize and implement the Annual Alumni Fund, special fund raising projects and capital and estate planning programs.
- *Student Recruitment*—help identify, cultivate and recruit parents and students for enrollment at the school (working closely with the school's admissions officer).
- *Awards and Recognition*—to identify alumni deserving of special recognition by the school; to develop and manage a program of awards for key alumni.
- *Reunion Committee*—to plan reunion celebrations for classes, Alumni Day or Homecoming activities and other alumni events on campus.
- *Student Alumni Orientation*—work with current students to acquaint them with the Alumni Association and prepare them for an active role as alumni after their graduation.

Every Board member should be on at least one of these program committees, and no more than two. In addition, there should be provision for the participation of *non*-Board members on these committees. This practice widens the circle of involved alumni and provides opportunity for new leadership to emerge. At one school I know, the new Chairman of the Development Committee of the Board of Trustees, who also recently made a first-time major gift to the school, just a few years ago was a non-Board member of the Alumni Association's Annual Giving Committee.

An Executive Committee and a Nominating Committee would be two additional standing committees. The Executive Committee is comprised of the officers of the Association and meets on-call between regular board meetings to transact business which cannot wait for the next regular Board meeting and to set the agenda for the next regular Board meeting. The Nominating Committee should be a standing committee operating year-round, constantly on the alert for emerging alumni leaders who can contribute to the work of the Board.

Alumni dues are pretty much a thing of the past, except in the case of some of the large public universities. A dues program is costly to maintain in terms of record keeping, it can separate from involvement those very alumni whom you wish to involve and it can provide a handy "excuse" for

an alumnus to decline an invitation to contribute to the Alumni Fund ("Because I've already given through my dues.") It is far better to include all alumni—graduates and non-graduates alike—as members of the Alumni Association, and for the school to underwrite the cost of the program. What might be foregone through lack of a dues program can be more than compensated for through alumni giving programs such as the Annual Fund.

All these structural details of the Alumni Association must be incorporated in a Constitution and/or By-Laws for the Association. Even though the Association probably doesn't need to be separately incorporated from a legal standpoint, a formal document of structure and operating procedure helps prevent problems and ensures a smooth-running operation. An example of Alumni Association By-Laws may be found in Appendix B.

Other Special Groups

Special councils and clubs for specific purposes provide further opportunities for alumni involvement. Typical among these is an Athletic Booster Club, often composed of parents as well as alumni, to support the various inter-scholastic athletic teams of the school. Such a group organizes fund-raising projects to fund special athletic department needs, plans social events and awards programs for team members and their families, fosters school spirit, handles ticket sales and concessions for games, and in general, promotes the sports program.

Another special alumni group is the "Old Guard". The Old Guard Club is comprised of all alumni whose class graduated 50 or more years ago, and is a vehicle to provide recognition and special activities for the older alumni. As the number of alumni in any one class tends to thin out in the older classes, an Old Guard concept provides an identity which transcends and supplants class identification. Special "induction" ceremonies for 50 year grads at the school's regular graduation exercises provides an annual focal point for the group and signals to all alumni and students alike that alumni are honored and valued throughout their lifetimes.

Regional Alumni Clubs are useful for those alumni bodies having a concentration in cities away from the campus. These

groups may be formally structured clubs with officers and several local activities annually for alumni in the area. Or they may be more loose-knit groups which come together once a year in a "Reunion" atmosphere to renew ties and to hear and celebrate news and progress of the school. Make sure the officers or convenors of these groups are invited to the school regularly—at least annually—to be rejuvenated and oriented to current school developments.

Staffing the Alumni Programs

An effective program of alumni interest, alumni involvement and alumni support of the school will not happen just because the school board or principal want it to happen. An alumni relations program, no matter how well it has been planned on paper, requires paid staff to make it go. In fact, the program will be no better than the staff directing it.

Someone in the school administration must be appointed Alumni Director and be given responsibility for the alumni program. This person is, in reality, the "manager" of the program. He or she works with the alumni volunteers in planning and implementing the various alumni events and projects on and off campus, collects and reports news on alumni achievements through alumni publications, develops ways to involve alumni in the life of the school and provides leadership in the annual alumni fund.

The Alumni Director (Alumni Secretary, Director of Alumni Affairs, etc.) serves as secretary of the Alumni Association, handles general correspondence with alumni, maintains the alumni mailing list and alumni records and files and makes sure that the calender of alumni activities is adhered to. The Alumni Director may write and edit the alumni newsletter.

Each year, the Alumni Director should prepare a Plan of Action for the alumni program, covering goals, plans, programs and a timetable for the coming year. This plan is based on overall development goals, and should include the following elements:

- the year's schedule of all alumni publications and general mailings.
- schedule and time-line for alumni reunions, work-

shops, Alumni Weekend, open houses, Career Days and other special events.

- plans and timetable for the annual Alumni Fund.
- priorities and plans for each alumni committee such as student recruitment, annual fund, continuing education, student orientation, records and recognition, career guidance and publications.
- key dates for Alumni Association Board meetings.

For a small school, the staff duties may be performed by the Director of Development. As the program grows, someone at least half-time should be retained as Alumni Director, reporting to the Director of Development. Oftentimes, this is an executive secretary with extraordinary skills; or, the duties may be assigned to a faculty member, whose teaching time is reduced accordingly. For larger schools, the Alumni Director may be full time.

The staff position is a professional one, as contrasted with a secretarial or clerical position. The characteristics to be found in an effective Alumni Director include the following:

- An understanding of and commitment to Catholic education in general and to your school in particular.
- Sense of responsibility and accountability.
- High standards, particularly in areas such as good taste, accuracy, appropriateness, promptness and timing.
- Ability to get things done.
- Great personal initiative—a self-starter.
- Ability to work hard for sustained periods.
- Ability to motivate others and motivate self.
- Ability to get along with others—must be personable and must enjoy meeting people.
- Lives up to a schedule—is able to schedule time for self and time and activities for others.
- Communication skills—must be a good listener and also must be able to express thoughts and ideas clearly in writing.
- Volunteer-oriented—must understand the dynamics of volunteers and be ready to give the limelight and credit to volunteer workers.

A job description for an Alumni Director appears in Appendix C.

Communicating with Alumni

For an alumni relations program to be fully productive, a school must consistently do an effective job of telling the alumni what it is doing and why its existence and future are important to the Church and to society.

Before a school can raise substantial funds from alumni, it must have their interest and understanding. Thus, increased acceptance for the school must be one of the prime objectives of a successful alumni relations program.

The school's overall public relations effort, in its broad approach to all publics, is the foundation for communications with alumni. (See *Public Relations*, another is this series of booklets published by the National Catholic Educational Association.) But as a special public, and as perhaps the largest of the school's publics, alumni warrant a focused plan of communications.

Publications

A school should have a program of sending regular communications to alumni telling them about the progress and plans at the school. Share financial data, enrollment facts, faculty changes, academic developments and policy shifts. Make sure alumni have a realistic and complete picture. In this regard, be sure to maintain current addresses for all alumni, including those who did not graduate as well as those who did. Report to alumni about the achievements of their fellow alumni. Invite alumni to share their lives and views through these regular alumni publications. When the alumni and the school are well informed about each other's programs and activities, each is strengthened.

Typical publications for alumni include an alumni magazine and/or newsletter. Such a publication should be issued at least quarterly. Budget will dictate size, number of pages, use of color, number of pages, etc., but frequency and regularity must be maintained. Quite often, a magazine or newsletter is used for communicating with both parents and alumni.

An Annual Report is another useful publication. Typically, this contains a re-cap of progress and achievements made during the year, recognizes all donors by listing their names, and outlines plans and dreams for the future.

Send special reports to alumni from time to time. Reports on the results of long range planning, evaluation and accreditation, college placement results and special surveys are of interest to alumni. So are reprints of significant speeches by the principal and distinguished school visitors and of major feature stories about the school which have appeared in local newspapers.

Meetings and Special Events

Don't overlook the opportunities for telling the school's story which abound in alumni Board meetings, special committee meetings, campus open houses, concerts, plays, Alumni Day and Homecoming events, regional gatherings of alumni in distant cities, convocations, retreats and workshops. Each meeting or special event a school sponsors should be considered an opportunity to tell its story.

An Alumni Fund Phonathon is another ideal means to communicate news about the school. Callers can be trained not only to ask for money, but to share one or two new facts or developments about the school with which the person called may not be aware. This will also make the request for a gift much more effective!

How the School Serves the Alumni

A school's ongoing relationship with its alumni is a two-way street. What a school seeks from its alumni by way of interest, involvement and investment is on one side; how the school recognizes its continuing responsibility to the alumni is on the other side. This other side—how the school serves its alumni—is often overlooked.

The School as a "Touchstone"

A school has an obvious responsibility to hold the official record of a student's performance and achievement. It keeps transcripts on file. Beyond that, the school's Alumni Office represents a valuable point of contact for alumni—a resource

for alumni to use. The Alumni Office should place a high priority on keeping up-to-date addresses on all alumni, and through these records, enable alumni to renew and maintain contacts with former classmates and former teachers. At most schools, the Alumni Office represents a valuable link for alumni. This responsibility is a genuine service which schools must not shirk.

In keeping with this, an Alumni Directory is a genuine service to alumni. The Directory lists current address and occupation, with cross-references by class and geography. Some schools issue these every five years or so. It requires a good record system and much more to publish a Directory. There are several private companies which publish directories for schools offering a great savings to the staff.

Continuing Education

Education is a life-long process and education is what schools provide. Opportunities abound for schools to offer learning experiences to students long after their formal academic training is completed. Most schools have tremendous resources in their faculty to provide worthwhile and needed educational programs not only for their alumni, but for parents, church members and the general public.

Some examples of continuing education programs for alumni include:

- special seminars on current events, politics, theology and church affairs, economics, the arts, literature, etc.
- mini-courses on academic and non-academic subjects alike, spanning a few weeks or a few months.
- study/travel tours to foreign countries, conducted by teachers from the school faculty.
- in-school lectures by visiting experts.
- weekend and summer educational retreats.
- special lectures and short courses on Alumni Day.

Cultural Enrichment

Most schools also represent a rich trove of artistic endeavor to share with alumni. School musicals, plays, recitals, con-

certs, art exhibits, literary magazines and liturgical experiences can be shared with alumni. Some schools extend to alumni the opportunity to participate in such events (i.e. an annual student-faculty-alumni play).

Athletic events are frequently of interest to alumni, and a school should routinely mail sports schedules to alumni, along with an invitation to attend and information on how to obtain tickets. Booster Clubs give alumni the opportunity to become actively involved if they are so interested.

Awards and Recognition

A good alumni relations program includes the recognition of noteworthy accomplishments of individual alumni through a regular program of honors and awards. Consider annual awards for alumni who have made significant contributions to society in general, to the Church or in their chosen professional field. Consider also, awards to those alumni who have rendered significant service to the school through participation on committees, the Alumni Board, the Board of Trustees and in other ways.

How Alumni Can Serve the School

While fund raising from alumni comes quickly to mind when a school reflects on how alumni can help the school, alumni represent a much broader and more significant resource of service to the school. In fact, if fund raising is the prime focus of the alumni relations program, it will never reach its full potential. Non-fund raising service and involvement from alumni will complement and enhance fund raising efforts.

Student Recruitment

Alumni volunteers represent an important resource for recruiting good students for schools. Studies have shown that prospective students quite often first hear about the school from one of its "satisfied customers"—students, parents, or an alumnus. While brochures, advertising and staff presenta-

tions at feeder schools are helpful, there's no substitute for referrals from a school's alumni and friends.

Each school should have a plan to involve its alumni actively in the recruitment program. Some of the ways alumni can serve include:

- Provide names of prospective students to the school.
- Talk about the school to their own children and to other relatives, neighbors and friends.
- Bring prospective students and their parents to the campus.
- Make suggestions to the admissions office about schools to visit, teachers, coaches and staff to meet, etc.
- Help organize and assist with receptions, teas, parties and talk sessions for prospective families.
- Telephone applicants and accepted students.
- Visit "feeder" schools on behalf of alma mater.
- Conduct admissions interviews.

Such involvement requires organization by the school's Alumni Director and Admissions Officer. Quite often this might be set up through the Alumni Association with a standing committee on Student Recruitment. Many of the tasks call for special training of the alumni volunteers as to techniques and procedure. But the results are well worth the effort.

Serving Students

Many alumni enjoy contact with young people and welcome opportunities to work with the students at their alma mater in appropriate ways. The alumni of one school in a large metropolitan area, for example, conduct an ongoing program of taking groups of students to see the city's great features—museums, cathedrals, architechtural treasures, city government, business and industries. Alumni plan and make all the arrangements for these outings—one thing which the school would simply never be able to do on its own.

Career orientation and exploration is another service to students. Your alumni represent vast resources in this area, and it is not difficult to recruit alumni to come to the campus

for a "Career Day" to share their experiences with students. Alumni will also agree to be available for meetings in their place of work for further consultation, and to even arrange student internships and work experiences for students.

For boarding schools, local alumni can enrich the life of boarding students through a "Host Family" program. Alumni families "adopt" a student and become a local friend. They invite the student into their home for meals and social times, go on weekend outings, movies, shopping trips, etc.

Alumni also must help in the orientation of students as to their responsibilities as alumni. Loyal alumni are created when they are students, and each school should have a strategy for indoctrinating students about the valuable role alumni play in the life of the school. Some Alumni Associations annually sponsor a dinner to honor the Senior Class and welcome them into the Alumni Association.

Administration and Management

While a school doesn't want alumni volunteers involved in the day-to-day operations and management of the school, alumni can bring their expertise to bear in a number of administrative areas. Perhaps the greatest of these is in the area of long range planning. The views and perspectives of alumni are valuable, and they have much to offer in evaluating, planning and carrying out future plans of the school. Be sure to include them on the overall Long Range Planning Committee as well as the various Sub-Committees in such areas as finance, enrollment, religious life, student activities, academic program, development, guidance and counseling, etc.

Alumni should serve on a school's lay Board of Trustees, other Advisory boards, special committees and task forces as well as the Development Council. One school has set up Alumni Visiting Committees. These are groups of alumni organized around areas of expertise and interest in such fields as science, mathematics, religion. They visit the academic department of the school, meeting with teachers, students and administrators. Their purpose is not to evaluate or grade the department, but to stimulate the school to self-examination of goals, objectives and means.

Helping in the Development Program

A successful development program has its basis in the alumni constituency. Beyond the gifts which alumni make to the various fund raising programs, which will be discussed next, alumni can serve the development goals of the school in several ways.

Alumni are excellent persons to help communicate the school's purpose, plans and goals to the appropriate publics. Those within and outside the Church constituency must have a keen awareness of the school, and alumni are in key positions to inform, interpret and influence others.

Alumni can assist with the planning of fund raising programs in annual giving for current operations, in special capital efforts for special projects (scholarships, equipment, library resources), in major campaigns for new buildings and endowment and in estate planning programs which provide gifts to the school through wills and trusts.

Alumni can help the school identify, involve, cultivate and solicit prospects for major gifts to the school, including individuals, corporations and foundations. This is perhaps the greatest area of need, and also the area in which alumni are most qualified to be of assistance to the school.

Alumni Fund Raising Programs

Fund raising programs at educational institutions are deeply rooted in alumni support. Strong alumni giving stimulates and is fundamental to support from parents, local businesses and corporations, foundations, individual friends, church groups and the many other publics. If those who stand to gain the most from a school's growth and strength don't support the school, why should anyone else? This reasoning underlies alumni fund raising program at schools, colleges and other types of educational institutions.

There are four phases of a comprehensive fund raising program among alumni which should be carried on simultaneously. These are:

- The Annual Fund for current operations, which seeks broad participation each year to undergrid the educational program. Annual Funds are synonymous with alumni; in fact, the Annual Fund was first called the

Alumni Fund—in the early years, alumni were the only prospects solicited. (The first such fund was started in 1890 at Yale University.)

- The effort to seek out alumni with special interests who may aid in various projects through gifts in moderate amounts or who will build personal funds for special or general purposes of the school.
- Bringing major capital objectives to fruition by cultivating those alumni prospects able to provide the large gifts necessary for such purposes. From time to time this may involve an intensive solicitation effort for a single capital project, such as a new building.
- Showing alumni how they can, with sound personal estate planning, provide for the school's long term financial strength through a bequest, charitable trust, gift annuity, gift of life insurance or some other form of deferred giving.

Certain fund raising elements apply to all of these phases of support. Make sure that your annual plan of action for fund raising from alumni includes:

- clearly defined goals for each phase, in terms of dollars to be raised, percentage of participation, class goals;
- a schedule of fund raising mailings, particularly for the Annual Fund. Include personalized and mass-produced letters, brochures, LYBUNT appeals, renewal letters, honor rolls and honor roll proof sheets;
- alumni phonathons, whereby a team of alumni callers meets to telephone every alumnus with an appeal to support the school;
- personal solicitation calls—face to face—on top alumni prospects by alumni volunteers and staff. Really big gifts will only come through personal cultivation and contact;
- a strategy and procedure for identifying, researching and bringing into a closer relationship with the school those alumni who can make major gifts to the school;
- class representatives or agents, representing each alumni class, who head up solicitation of their classmates in the Annual Fund and for special projects. Every five or ten years, a class should be mobilized by the agent to make a special Reunion Gift to the school, as a part of the Annual Fund or for a special purpose identified by the class. At some schools, there is a separate Be-

quest Representative, who promotes trust and bequest gifts among classmates;

- special events to cultivate and recognize donors, particularly major donors, including luncheons, dinners, receptions, invitations to concerts and lecturers, open houses;
- a specific calendar or timetable for the year, which is carefully mapped out in detail, and followed slavishly by staff and volunteers.

Appproaches to alumni should focus on the school's strengths—what it is doing for students today and how it proposes to serve future generations of students. Appeals constructed on the basis that alumni didn't fully pay for their education, and that they have a moral obligation to contribute, are not terribly productive and are often offensive. Alumni will give because they believe in the school, are grateful for what it has done and is doing, and because they want it to grow and prosper, not because of an implied debt.

(Also see *Annual Fund/Estate Planning*, another in this series of booklets published by the National Catholic Educational Association.)

Special Activities and Events for Alumni

Alumni like to return to the school and renew old acquaintances, as well as to learn about new developments. An effective alumni relations program provides several events annually for the enjoyment and edification of alumni.

Alumni Weekend or Homecoming

Each year, usually in the fall, many schools organized a day-long or weekend program of activities for alumni. Alumni Weekend or Homecoming provides alumni the opportunity to restore friendships with former classmates, visit again with former teachers, tour and view the campus, "relive" former days and gain insight into today's students and the challenges facing the school in the immediate future. A sample schedule for an Alumni Weekend appears in Appendix D.

Class Reunions

The occasion of a reunion (usually on a multiple of every five years) will draw alumni together in great numbers. To maximize the impact and benefit to the alumni relations program, the school's Alumni Director should provide strong leadership in coordinating the plans, helping with the arrangements and promoting the reunions. If all the reunions can be held on the same weekend, large group events can be arranged which will enhance the experience for all alumni significantly. Sometimes these are arranged on Alumni Weekend. This makes a big weekend for the school staff, but it is well worth it.

Each reunion class should have a Class Reunion Chairperson, recruited at least a year in advance, who heads up a small committee from the class to plan the reunion. This committee writes letters promoting the reunion (at least three or four during the year prior to the reunion), with each successive letter listing the names of those who have indicated they will be attending. The committee should also telephone classmates nearer the reunion date as a final reminder. The Reunion Committee makes reunion party plans and arrangements, working closely with the Alumni Director and coordinating them with plans the school is making.

Class reunion gifts should be promoted by the school, working with a class Reunion Gift Chairperson, who works in concert with but separate from the Reunion Committee itself, so that the reunion does not take on the aura of a fund raising venture.

Regional Gatherings

Schools having concentrations of alumni in cities and regions distant from the campus should organize annually a dinner, reception, summer picnic or some other event to draw alumni together,. Typically, the Principal would attend, bringing school greetings and news of current developments. Several teachers, particularly those known by the alumni, add to the success of the occasion. For alumni who live far from the school, and for whom Alumni Weekend attendance is difficult, regional gatherings are a good substitute.

A local alumni host committee should be in charge of the local arrangements, making phone calls and receiving reservations. The school's Alumni Director coordinates the date, prepares invitations to be sent from the campus, and arranges for the speaker(s) from the school.

Young Alumni Activities

Mindful that alumni loyalties must be developed early, more and more schools are developing social programs for young alumni—those still in college. These include special activities scheduled during Alumni Weekend, parties or receptions during Christmas vacation or Easter break, and alumni/varsity sports contests (basketball, football, soccer). All are aimed at helping the alumnus realize that the school continues to be a valuable force in the life of the alumnus.

Anniversaries and Special Events

Alumni should be invited to school anniversaries and Founders' Day celebrations. Special anniversaries such as the 50th, 75th, 100th, 125th, etc. should have a special focus and are a good way to involve and revitalize alumni interests in the school.

Also, don't forget to invite alumni to the various special events typically organized by parents each year. Many alumni enjoy attending and supporting auctions, fairs, bazaars and similar events.

Records and Research

Good records of alumni ensure the efficient operation of an alumni program, and the Alumni Director should place a high priority on the accuracy and comprehensiveness of the alumni record keeping system.

There are many different procedures and systems for keeping address and biographical information on alumni. With the popularity, availability and affordability of micro

computers, the alumni office at even a very small school can develop and maintain an efficient record system.

Records exist to be used. Many schools waste hundreds of hours on record keeping systems which are not workable. There are three simple rules for streamlining your records operations:

- keep all the information you need
- keep *no more* than you need
- keep it in one place

Once you begin keeping records on an alumnus, the person is not just a name on a file card, but a person who is potentially capable of investing heavily in the school. The more information you have about a prospect, the better your chances are of being able to reach that person effectively.

Research Alumni

Periodic alumni questionnaires are a good way to gain basic biographical information about alumni. To ease the flow of work for the office, you might establish a program of sending questionnaires to every reunion class each year. This way, each alumnus' record is updated every five years. And, alumni are much more apt to return questionnaires when they are a part of the class reunion process. A sample alumni questionnaire is included in Appendix E.

Alumni with leadership potential or who are major donor prospects warrant additional research. Much information is of a public nature. Reference works such as *Who's Who, Standard and Poors, Fortune* and *Forbes* magazine directories, social registers, regional business and general circulation magazines and newspapers are helpful. All can be found in most public libraries.

On an informal basis, the Alumni Director should periodically meet with people who have access to needed information and people who have access to and contact with many other people. Key alumni of the school will usually be glad to share infomration when they understand the importance of researching in helping the school reach its goals. Local pastors and other church leaders will frequently be helpful in this manner if invited to do so.

Conclusion

The fundamental purpose of an alumni relations program is to create and nourish an active alumni interest in and understanding of alma mater and of the role of Catholic education in a free society. Alumni are willing and ready to be involved in the advancement of the schools, for they are the one "public" with the most to gain from the school's growth and prosperity and the one with the most to lose from the school's failure.

Alumni relations is an integral part of the comprehensive development program of the school which has three principal objectivs:

- To build public awareness and acceptance of the mission, aims and goals of the school;
- To attract voluntary financial support for current operations, capital growth and long term financial availability; and
- To attract the numbers and types of students who can be best advantaged by the school's educational program.

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Appendices

Appendix

Tips for Utilizing Alumni Volunteers Effectively

1. Indoctrinate the alumnus in the functions and objectives of the school and the facts about its operations. An uninformed volunteer cannot possibly be an effective ambassador.
2. Define the role clearly, so that the volunteer knows what is expected and how the job fits into the overall development program.
3. Provide the volunteer with the tools needed to do the job, including good written instructions, printed materials, reports, background material and information that is complete, accurate and up-to-date.
4. Employ every means possible to utilize the volunteer's time efficiently, such as giving advance notice of meetings and taking care to make all meetings and other time demands to the point and worthwhile.
5. Keep the alumnus continuously informed through regular contacts, minutes of meetings and regular progress reports, both on the area in which the volunteer is working and upon other areas related to the welfare of the school.
6. Recognize the importance of the volunteer's service through appropriate expressions of appreciation, invitations to campus events, etc.

B

Appendix

Sample Alumni Association By-Laws

ARTICLE I
Name

1. The name of this organization shall be: the XYZ High School Alumni Association.

ARTICLE II
Purposes

1. The Association is organized for the purpose of organizing the interest and resources of members of the Association in support of the educational program of XYZ High School; to keep alumni informed of the activities and program of the School and to serve alumni following graduation; and to act as an organization for the mutual exchange of ideas between the Association and the School

ARTICLE III
Membership

1. Active membership shall consist of:
   A. Holders of a diploma from XYZ High School.
   B. Students who pursued courses leading to a diploma, but who did not graduate.
2. Honorary memberships shall consist of selected non-alumni from the following groups:
   A. Members of the Faculty.
   B. Members of the Board of Education.
   C. Officers of the Administration.
   D. Others who by reason of their assistance, support and advice to the School and the Association are elected to membership by the Board of Directors.

ARTICLE IV
Directors

1. The Alumni Association shall be governed by a Board of Directors which shall consist of twenty-four alumni elected by the Association at its annual meeting. Each member shall be elected for a term of three years and the terms shall be so staggered that each year eight new members will be elected by the Association. Vacancies

shall be filled by a majority of the remaining members of the Board for the unexpired portion of the term.

2. The Board of Directors will meet not less than four times each year and shall consider the program of the Association and establish goals for carrying forward the work of the Association.

A quorum of the Board of Directors shall consist of 13 members of the Board.

Officers of the Association will be elected by the Board of Directors for a term of one year.

ARTICLE V
Executive Secretary

1. The Executive Secretary shall be appointed by the School and shall be an ex-officio member of the Board of Directors of the Alumni Association. (The Executive Secretary shall also serve as Alumni Director for the School.)

ARTICLE VI
Officers of the Association

1. The officers of the Association will be: President, Vice-President, Secretary-Treasurer.
2. The officers of the Association shall serve from July 1 through June 30 of each year.

ARTICLE VII
Duties of Officers

1. The President will preside at all meetings of the Board of Directors and the Alumni Association and will appoint the Committees responsible for the maintaining of liaison and communication between the Association and the Administrative Officers of the school.
2. The Vice-President will serve in the absence of the President and will perform such other duties as would be helpful in maintaining a strong and effective Alumni Association.
3. The Secretary-Treasurer will take minutes of all Board Meetings, Meetings of the Association, will furnish a re-

cord of such Minutes to the Alumni Director and will handle Association funds and bank accounts, if such exist from time to time.

ARTICLE VIII
Committees

1. There shall be seven standing Committees of the Board. Non-Board members may serve on these committees, but a majority of the membership shall be Board members. Additional committees may be established as needed.
2. ***Alumni Fund Committee***—The Alumni Fund Committee will be responsible for the organization of the alumni of XYZ so as to obtain annual contributions to the Alumni Fund and to assist XYZ in such other campaigns for funds as may be necessary from time to time.
3. ***Student Recruitment Committee***—The Student Recruitment Committee will develop a program so as to explain to prospective students the type of education which may be obtained at XYZ; to organize the alumni for the purpose of assisting in obtaining adequate numbers of students of the quality and character desired by XYZ; and, to assist the school Administration in maintaining a continuing recruitment program.
4. ***Communication Committee***—The Communication Committee will aid the staff in reviewing and planning alumni publications throughout the year, in communicating the story of XYZ to newspapers, radios, television and the public and work with the School Development Office in obtaining a continuous flow of news and information concerning the activities of XYZ.
5. ***Records and Recognition Committee***—The Records and Recognition Committee will assist in maintaining accurate and up-to-date records of all alumni and the achievements of the alumni of XYZ. Annually, the Committee will recommend outstanding alumni to the Board of Directors to receive the Distinguished Service Awards for service to their profession, community and service to the school. The Committee will keep a record of all outstanding alumni and seek advise and suggestions from members of the Association regarding potential alumni who should be recognized for their service.

6. ***Reunion Weekend Committee***—The Reunion Weekend Committee will work with reunion year classes in coordinating reunion activities, plan general activities for all alumni and assist with arrangements for Alumni Weekend and similar events.
7. ***Nominating Committee***—The Nominating Committee will prepare a list of candidates willing to stand for election to the Board at the annual meeting. This list will be presented to the Board for approval at least two months prior to the Annual Meeting.
8. ***Executive Committee***—The Executive Committee will be comprised of the officers of the Association, plus all standing Committee Chairpersons. The Executive Committee shall meet on call to transact such business as may need action between Board members. Any action so taken must be ratified by the Board at its next regular meeting.

ARTICLE IX
Meetings

1. The Alumni Association shall meet annually or on request of a majority of the Board of Directors. At special meetings, only those items specified in the call for the meeting shall be transacted.

ARTICLE X
Association Year

1. The fiscal year ~~of the~~ Association will begin on July 1 and end on June 30 of each year.

ARTICLE XI
Amendment of By-Laws

1. The By-Laws may be amended by the affirmative vote of two-thirds of the members present at any annual or special meeting of the Association.

Description for an Alumni Director

The following are the primary responsibilities of the Alumni Director of XYZ School.

1. To function as a part of the Development Office and report administratively to the Director of Development.
2. To serve and work with the Alumni Association Board of Directors.
3. To serve the Committees of the Alumni Association and keep them well informed.
4. To maintain and keep up-to-date the records of the alumni of the School. These will be maintained by class, geographical area, alphabetically, and by zip-code area.
5. To locate lost alumni.
6. To bring potential prospects for gifts to the attention of the Director of Development.
7. To serve as editor of the Alumni News, and assist with the writing of the Alumni Bulletin.
8. To help plan special events for the Alumni.
9. To help the School more effectively serve the Alumni.
10. To assist with the Alumni Fund as requested by the Director of Development.
11. To secure from the Director of Development information on alumni gifts—this will be used to up-date the gift information on the alumni cards.
12. To write, for the Principal, thank you letters to alumni donors.
13. To handle additional correspondence with the alumni.

Sample Alumni Weekend Schedule

Friday

1:00–5:00 p.m.	Alumni Weekend registration, central campus location. Alumni tours of campus facilities, conducted by student tour guides.
6:30–8:30 p.m.	Alumni reception for all alumni (on campus or at restaurant or banquet hall).
8:30–?	Class reunion parties at specified locations (homes of alumni, restaurants, on-campus, etc.) for classes celebrating 5th, 10th, 15th, 20th, 25th, 30th, 35th, 40th, 45th, and 50th reunions.

Saturday

9:00–5:00 p.m.	Alumni Weekend registration continues.
9:30–11:00 a.m.	"Meet the Faculty"—attend abbreviated class presentations by some of XYZ School's outstanding teachers. The agenda: "Forecasts of the Economy for 1990" "Modern Art and the High School Student" "Introduction to Computers for Adults" "Heroes in American Literature" "Space Technology and the Modern Home"
11:00–1:30 p.m.	Principal's Brunch—join with other alumni and XYZ teachers for brunch and learn about the state of XYZ High School today. Entertainment by student musical groups.
1:30–2:00 p.m.	Class reunion photographs. Don't be left out of your historic photo!
2:00–4:00 p.m.	Choose an activity according to your interest: • campus tour conducted by students • girls varsity soccer game, with ABC School • more reminiscing with your classmates • coffee hour with teachers in John Doe Lounge • physical science experiments by students in the science lab
4:30–7:30 p.m.	Alumni Weekend Barbecue—meet all your friends for an informal barbecue on South campus. Annual Alumni Merit and Service awards for outstanding alumni will highlight a brief alumni program. Reunion Classes will be seated together and will be honored at this time.
8:00 p.m.	XYZ football game on the school field. The Wildcats will take on the ABC Mudrats.

Sunday

8:30–9:30 a.m.	Continental breakfast for Alumni, John Doe Lounge
9:30–10:30 a.m.	Alumni Mass, school chapel
11:30–1:00 p.m.	Farewell luncheon

Appendix

XYZ High School Alumni Survey

DATE _____

I. YOUR NAME _____ CLASS _____

ADDRESS _____
(Number, Street or Avenue) (City) (State) (Zip)

II. MARITAL STATUS (circle one):

MARRIED SINGLE WIDOWER DIVORCED REMARRIED

IF MARRIED ALUMNA, PLEASE GIVE YOUR MAIDEN NAME: _____

III. WIFE OR HUSBAND'S FULL NAME IF *NOT* AN ALUMNUS _____
Did spouse attend XYZ High School? Yes ☐ No ☐
Graduate? Yes ☐ Year _____ No ☐

IV. YEARS *YOU* ATTENDED XYZ HIGH SCHOOL? from _____ to _____
Graduated? Yes ☐ No ☐
If non-graduate, please list school(s) attended and year graduated:

_____ from _____ to _____ Graduated _____ (year)

_____ from _____ to _____ Graduated _____ (year)

V. COLLEGES AND/OR UNIVERSITIES ATTENDED: DEGREE YEAR MAJOR
(Include undergraduate, graduate and/or professional schools even if degrees were not earned.)

_____

_____

_____

Academic honors: What and Where? _____

_____

VI. CHILDREN: (names and birthdates) _____

_____

VII. RELATIVES who have attended XYZ High School (please indicate relationship to you, their class and school)

_____

_____

VIII. WHAT IS YOUR PRESENT OCCUPATION/PROFESSION? _____

If employed by firm, give name: _____

What is your position or title? _____

Business address and phone: _____

If retired, give former occupation or profession and date of retirement: _____

_____

IX. PLEASE LIST ANY MEMBERSHIPS, HONORS, OR DISTINCTIONS that have come to you since you left school ... public, business, civic, fraternal, published writings, scientific, military, religious, and other:

_____

_____

_____

X. NAME OF PRESENT PARISH: _____

XI. CURRENT ITEMS OF INTEREST: _____

_____

XII. NAMES AND ADDRESSES of two friends who will always have your correct address:

_____

_____

_____

XIII. YOUR PARENTS' NAME AND ADDRESS: _____

_____

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